Performance Management Plan
Guide for Charter Holders

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Revised September 2015

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Introduction to the PMP Process

A Performance Management Plan (PMP) is a continuous improvement plan and an accountability agreement between the Charter Holder and the Arizona State Board for Charter Schools (Board) for the academic performance of schools operated by the Charter Holder. PMPs are assigned

in accordance with the Academic Intervention Schedule and Policy Statement. For each school operated by the Charter Holder that has a current overall rating of does not meet or falls far below the Board's standard of academic performance, the Charter Holder will be required to submit required information that demonstrates it is making sufficient progress toward the Board's academic performance expectations. If this is the first time any school operated by the Charter Holder has received a rating of does not meet or falls far below , the Charter Holder will be required to submit a Performance Management Plan.

The purpose of a PMP is to focus the Charter Holder on improving pupil achievement sufficiently to meet the Board's standard by ensuring the Charter Holder has created a comprehensive, sufficiently detailed and implementable plan that is implemented at all schools operated by the Charter Holder. The PMP describes the Charter Holder's plan for creating and implementing integrated systems in the areas of Data, Curriculum, Assessment, Monitoring Instruction, Professional Development, Increasing Graduation Rate (if applicable), and Academic Persistence (if applicable) as described in Appendix D of the Board's Academic Performance Framework and Guidance.

In its determination of whether a Charter Holder fails to demonstrate sufficient progress toward the Board's academic performance expectations through the submission of a PMP, the Board will evaluate the Charter Holder's thoroughness and detail in creating a continuous improvement plan as described above, to improve academic performance. The evaluation criteria for a PMP are provided in the Board's *Academic Performance Framework and Guidance* document (Appendix D).

A Charter Holder assigned a PMP will continue to be monitored in subsequent years to determine whether the Charter Holder can demonstrate that it is making sufficient progress toward meeting the Board's academic performance expectations through implementation of a comprehensive continuous improvement plan as described in Appendix E of the Board's Academic Performance Framework and Guidance document. A Charter Holder that fails to demonstrate that it is making sufficient progress toward meeting the Board's academic performance expectations may be brought before the Board for consideration. Thus, for any area where the PMP action steps or evidence are evaluated as "Does Not Meet" or "Falls Far Below", the Charter Holder should make appropriate revisions to address the identified deficiencies.

If a Charter Holder's PMP is evaluated as "Falls Far Below" for both Action Steps and Evidence in any two areas, the Charter Holder has failed to demonstrate that it is making sufficient progress toward meeting the Board's academic performance expectations and may be brought before the Board for consideration. A Charter Holder's failure to address all required elements in its PMP will be considered by the Board in making its determination. The Board may refuse to accept additional information prior to or during Board consideration.

The Board has designed this guidance document to provide practical information on the PMP process in order to inform stakeholders on how to prepare a PMP and what the expectations are. Familiarity with the following procedures and protocols will help to ensure that the PMP is submitted in its complete form. At the end of this document, is a checklist (Attachment A) to assist the Charter Holder in preparing their PMP.

Location of Relevant Documents

Each Performance Management Plan must be prepared using the PMP Template. The PMP Template can be located on the Board's website or in the help files on ASBCS Online.

To locate the PMP Template on the Board's website:	To locate the PMP Template on ASBCS Online:
1. Go to the Arizona State Board for Charter Schools website (www.asbcs.az.gov)	1. Go to ASBCS Online (http://online.asbcs.az.gov)
2. Locate the "For Charter School Operators" section in the middle of the page.	2. Log in using the user name and password of the Charter Representative*
3. Select the "Performance Expectations & Reviews" link.	3. Locate the "Help" section of the Dashboard.
4. Select the "Academic Interventions" tab.	4. Select "Online Help"
5. Scroll down to the "Performance Management Plan" section.	5. Locate the "Performance Management Plan Template".
6. Locate the "Performance Management Plan Template".	*If the password cannot be located, click the "Forgot Password" icon on the login page to reset the password. An email will be sent to the Charter Representative's email on file from the ASBCS System Administrator (charterschoolboard@asbcs.az.gov) with instructions for resetting.*

Online technical assistance for the PMP is also available. To locate the PMP Online Technical Assistance presentations on the Board's website:

1. Go to the Arizona State Board for Charter Schools website (www.asbcs.az.gov)
2. Locate the "For Charter School Operators" section in the middle of the page.
3. Select the "Performance Expectations & Reviews" link.
4. Select the "Academic Interventions" tab.
5. Scroll down to the "Performance Management Plan" section.
6. Locate and click the link for the PMP Online Technical Assistance presentation you wish to view.

Components of the PMP

The PMP Template requires a plan to address each of the areas of Data, Curriculum, Assessment, Monitoring Instruction, and Professional Development. Charter Holders who receive a "No Rating", "Does Not Meet Standard" or "Falls Far Below Standard" for the Graduation measure must also address the Graduation Rate area in their Performance Management Plan. Charter Holders who receive a "No Rating", "Does Not

Meet Standard", or "Falls Far Below Standard" for the Academic Persistence measure must also address the Academic Persistence area in their Performance Management Plan.

Only one (1) PMP Template document may be submitted. Additional documents will not be reviewed.

The Performance Management Plan

A thorough and sufficiently detailed plan will provide answers to each of the guiding questions for an area. The totality of the processes described within each area shall comprise an ongoing system implemented at the school. Board staff will evaluate the PMP using the evaluation criteria located in Appendix D of the Board's Academic Performance Framework and Guidance. Each plan will include:

- Action Steps - The Charter Holder must identify specific actions, tasks, or meetings that contribute to the required systems. Include continuation of effective processes, revision to existing processes, or creation of new processes.
- Person(s) Responsible – The Charter Holder must identify the title/role/position of the individual(s) that are responsible for completing each Action Step.
- Frequency and/or Timing – The Charter Holder must provide the frequency (i.e. weekly, monthly, every other Wednesday) and timing (i.e. two days after benchmark testing, within 48 hours of completing a classroom observation) for the completion of each action step.
- Evidence of Implementation – The Charter Holder must list documentation that will serve as evidence of the completion of the action step. Evidence must be able to demonstrate completion of all components of the action step. Should the Charter Holder be assigned to a Demonstration of Sufficient Progress (DSP) monitoring process in subsequent years, the documentation listed in the PMP will be required as evidence of the implementation of the system.
- Process for Implementing Action Step– The description of the fundamental elements for each action step should include any information that is collected, reviewed, or created. The Charter Holder must include any criteria used for making decisions, and any external technical guidance or support that will be utilized for the completion of the action. Essential details will answer all what, where, and how questions required to enable implementation of each action step.

PMP Template Instructions

Reflection Response

The Reflection Response is a tool designed to aid in the creation of a complete PMP. **The Charter Holder is NOT required to complete nor submit the Reflection Response. However, it is highly recommended that Charter Holder staff complete this activity prior to completing the PMP**.

1. Locate the Reflection Response on the ASBCS website. This can be found at https://asbcs.az.gov/school-resources/academic-performance/academic-interventions.
2. Read the directions on the Reflection Response. As stated, the purpose is to prompt the Charter Holder to reflect on existing processes, and identify where processes need revisions or new processes may be required.
3. Use the Reflection Response as a tool to reflect on the "who, what, and when" of the Charter Holder's existing processes.
4. This information will be the base of your PMP. Use the reflection to compile the action step, person(s) responsible, frequency and/or timing, and evidence of implementation.

Preparing for Your PMP

1. View the PMP Online Technical Assistance presentations for guidance regarding the PMP process.
2. Familiarize yourself with the requirements of a PMP that meets the Board's criteria. Review the evaluation criteria listed in the Board's Academic Performance Framework and Guidance document (Appendix D).
3. Familiarize yourself with the performance indicators (Growth, Proficiency, and Post-Secondary Readiness) listed in the Terms to Know and Academic Performance Framework and Guidance. Determine how the Charter Holder will be accountable for providing any required year-to-year comparative data for each measure under the performance indicators.
4. Understand the academic performance of each school operated by the Charter Holder. Review the Academic Dashboard for the school(s) (found on ASBCS online) operated by the Charter Holder to identify measures that did not meet the Board's academic standards.
5. Identify important documents and data for each measure. Using the description of the measures and the evaluation criteria as guidance, identify the processes the school has in place to evaluate, track, and support student performance in each measure. Analyze data and documents related to those processes to become familiar with the how each process is currently implemented.
6. When the PMP is complete and ready to submit, save the document. Charter Holders must clearly label the submitted information using the following file naming convention: <CHARTER HOLDER NAME>_PMP_Academic Performance Required Information

PMP Template Completion Instructions

General Template Instructions

When creating the Performance Management Plan, use the following guidelines:

1. Refer to the **Terms to Know** section (Attachment B) which is included at the end of this document. All words or phrases **bolded and underlined** in the PMP template are included in this section. Knowing and understanding these terms will provide additional guidance in completing the PMP template.

2. The plan must provide sufficiently detailed and implementable action steps that address each of the following required elements to create comprehensive Curriculum, Assessment, Monitoring Instruction, and Professional Development systems. Additionally, if applicable, the plan should address Graduation Rate and Academic Persistence.

3. The action steps must identify documentation (Evidence of Implementation) that can serve as detailed evidence of completion of the action step for of each of the required elements of a comprehensive system in each area required by the Board's Academic Performance Framework.

4. An Action Step (and its corresponding details) may be applicable to more than one Guiding Question within each section (i.e. A. Evaluating Curriculum). If an Action Step applies to more than one Guiding Question, indicate this by writing "Refer to (numbered Action Step) in the appropriate box. For example, if Action Step 1.1 applies to Action Step 2.2, write "Refer to Action Step 1.1" in the box marked for Action Step 2.2.

5. To add an additional Action Step in a section, follow these steps:
   - Select the Action Step table to be copied.
   - Right click and select "copy".
   - Place cursor where you want to insert table.
   - Right click and select "paste".

6. Board staff will evaluate the PMP using the evaluation criteria located in Appendix D of the Board's *Academic Performance Framework and Guidance*.

Revised PMP Instructions

If an initial PMP has been submitted and evaluated, the Charter Holder may have the option to revise and resubmit a PMP. In this case, follow the directions below:

1. If the current initial PMP was created **prior** to September 1, 2015:
   - **Use the updated PMP TEMPLATE** provided on ASBCS online. Directions for accessing this template can be found under "*Location of Relevant Documents*".
   - Use the "Crosswalk – PMP Revisions" document to identify the differences between the old and new PMP templates. This document is located under the "Academic Interventions" section of the *Board's website*.

2. If the current, initial PMP was created with the updated template released on September 25, 2015:
   - When making changes to your PMP, use a blue font for any text that has changed.
3. During the revision timeframe, the Charter Holder has the option to schedule a 30 minute meeting with Board staff to receive technical guidance prior to submitting the revised PMP. Contact the Board staff member indicated in the PMP Initial Evaluation letter.
4. Ensure that all action steps that were not evaluated as "meets" have been addressed in the revisions.
5. Ensure that all technical guidance questions have been answered in the revisions.
6. Submit according to the directions provided in the PMP Evaluation letter.

Charter Information

Fill out this section completely, including:

- The Charter Holder Name
- All Schools operated by the Charter Holder (separate school names with a comma)
- The Entity ID assigned to the Charter Holder
- Submission date (this is the date the PMP is provided to Board staff or uploaded to the DMS)
- Indicate if the PMP is a revised version of a previous PMP
- Choose the applicable reason for the PMP submission
- Indicate which academic dashboard year for which the school received a PMP assignment

Example of Completed Action Step

Below is an example of an action step for the area of Curriculum. Each action step includes a description of the action, who is responsible, when the action step occurs, and the evidence of documenting implementation of the action step. Subsequently are the processes for implementing the described action step. The outcome is to include an action step that is sufficiently detailed and provides implementable action steps.

AREA II: CURRICULUM

Complete the plan for each of the six sections. Provide **sufficiently detailed** *and* **implementable action steps** *that address each of the following sections.* (See *Terms to Know*)
For each Action Step you add, ensure all fields have been completed.

A. Evaluating Curriculum

Guiding Question #1: What ongoing process will the Charter Holder use to evaluate curriculum? What criteria will guide that process?

Action Step 1	Person(s) Responsible	Frequency and/or Timing	Evidence of Implementation
Curriculum Committee Analyzes Collected Data from Curriculum Evaluation Forms	Curriculum Committee (consisting of: Principal, Assistant Principal for Academics, Instructional Coach, 8th Grade Math Teacher)	First Monday of every month For 2014-2015: (September 1st, October 6th, November 3rd, December 8th, February 2nd, March 2nd, April 6th, May 4th)	•Curriculum Committee meeting agendas (for each monthly meetings) that include topics, dates, and times •Curriculum Committee meeting minutes (for each meeting) that summarize action steps as well as curricular resources in each area of action •Completed Curriculum Analysis Sheets for all meetings •Completed Curriculum Committee action step lists for all meetings

Process for Implementing Action Step 1

At the beginning of every month (as identified by the dates in the Intervals column), the Curriculum Committee will meet to compile and analyze data gathered from completed Curriculum Evaluation Forms. Data will be aggregated by each component of the curriculum according to rubric scores from individual teacher Curriculum Evaluation Forms. The Committee will compile the following using a Curriculum Analysis Sheet:

- Any component of the curriculum identified as not sufficiently or partially aligned to ACCR Standards
- Any component of the curriculum identified as not sufficiently or partially meeting the appropriate rigor level
- Any component of the curriculum identified as not sufficiently or partially containing sufficient content and supplemental materials
- Any component of the curriculum identified as not sufficiently or partially containing appropriate differentiation for all subgroups

For any components of the curriculum in the above area, the Committee will create a list of action steps to be taken with Board approval. The Committee will compile action steps in an action step list.

Area I: Data

This area is divided into two sections, a description of how data is valid and reliable and a table to identify the school's internal benchmarking data for math and reading. Read carefully through the information below, and ensure that each aspect is addressed in the PMP

Completing the Data Table:

1. Refer to the General Template Directions and Terms to Know when completing this section.
2. In the first data table, the Charter Holder must identify the internal assessments that are used to gather **benchmarking** data.
3. In the drop down menu under "Assessment Tool"[1], choose the type of assessment tool that will be used for internal benchmarking for math and reading.
    a. If the Charter Holder's tool is not listed, select "Other" and provide the name in the "Notes" column.
    b. If more than one tool will be used, select "Multiple" and provide the names of all tools in the "Notes" column.
4. Explain how the Charter Holder has verified that the internal data collected is **valid and reliable** in the space provided. See the Terms to Know for further guidance.
5. In the second data table, the Charter Holder must complete the necessary information to demonstrate that data will be gathered for each assessment measure required by the Board.
    a. Select the students who will be measured, whether the group measured will be all students, only full academic year (FAY) students, persistent, or non-persistent students.
        i. If the group of students to be measured is not listed, select "Other" and provide a description of the student group in the box directly beneath the drop down list.
    b. Indicate the identifying data by selecting an item from the drop down list.
        i. If the identifying data is not listed, select "Other" and provide a description in the box directly beneath the drop down list.
    c. Describe how the data will be presented. This may be the name of the report taken from the assessment system.

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[1]. The list of assessment tools is based on those commonly used by charter schools and is not intended to reflect an endorsement of any one assessment tool. The Board has not independently evaluated any assessment tools and makes no claims regarding the validity, reliability, or predictive qualities of the assessments listed.

Area II: Curriculum

This Area is divided into six sections, each with a set of guiding questions. An acceptable plan for this area will provide sufficiently detailed actions steps that includes each of the required elements and presents a comprehensive curriculum system. Refer to the General Template Directions and Terms to Know when completing this section. Read carefully through the information below, and ensure that each aspect is addressed in the PMP:

	Section	Aspects that MUST be described in detail in the PMP
A	Evaluating Curriculum	- determining if curriculum is effective based on criteria set by the school, - ensuring that the curriculum allows students to meet the standards, - determining if the curriculum addresses other site specific required elements, - verifying whether curriculum is aligned to student needs, and - identifying if a curricular gap is preventing the students from mastering a standard
B	Adopting Curriculum	- adopting new and supplemental curriculum - gathering curriculum options - evaluating proposed curriculum programs and materials
C	Revising Curriculum	- making revisions to existing curriculum - replacing/supplementing existing curriculum thorough adoption of new curriculum.
D	Implementing Curriculum	- integrating curriculum into instruction consistently - implementing the curriculum with fidelity to the design of the curriculum and program of instruction.
E	Alignment of Curriculum	- verifying that curriculum is aligned to ACCRS - ensuring that the curriculum maintains alignment as it is revised.
F	Adapted to Meet the Needs of Subgroups	ensuring that implemented curriculum and supplemental curriculum meets the identified needs of students in subgroups.

Subgroup Curriculum Table: In the PMP template complete the Curriculum Subgroup table (see below) with the applicable information:

1. Provide the Charter Holder's plan to address how implemented curriculum, including supplemental curriculum, will address the needs of ALL subgroups.
2. A plan is required for all subgroups, regardless of whether the Charter Holder currently serves students in each subgroup.

Subgroup Curriculum Table

Subgroup	How will the Charter Holder ensure that implemented curriculum meets the identified needs of students in the following subgroups?
Students with proficiency in the bottom 25%/non-proficient students	
ELL students	
Students eligible for FRL	
Students with disabilities	

(sample provided for reference)

Area III: Assessment

This Area is divided into three sections, each with a set of guiding questions. An acceptable plan for this area will provide sufficiently detailed actions steps that includes each of the required elements and presents a comprehensive assessment system. Refer to the General Template Directions and Terms to Know when completing this section. Read carefully through the information below, and ensure that each aspect is addressed in the PMP:

	Section	Aspects that MUST be described in detail in the PMP
A	Developing the Assessment System	• creating a data collection system that involves both formative and summative assessments, • ensuring the assessment system is aligned to • the curriculum and • the instructional methodology/program.
B	Analyzing Assessment Data	• students are performing, • whether instructional methodology and curriculum are meeting the needs of all students, and • what adjustments are made when methodology and/or curriculum are not meeting student needs.
C	Adapted to Meet the Needs of Subgroups	• specifically evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group.

Assessment System Table: Complete the table using applicable information:

- Assessment tool: Indicate what assessment tool is being used for each grade level. More than one assessment can be used. Examples: Galileo, AZ Merit, Teacher made assessments, DIBELS, Textbook Assessment, STAR Reading, etc.
- Grades: Indicate which assessments are used at **every** grade level.
- How it is used: indicate whether the assessment is used a formative, summative, benchmark, or other type of testing.
- Performance measures: indicate which measures are assessed. For more information, see the Terms to Know.
- Assessment data generated: indicate what type of data is generated by the performance measure. Examples: reports on students passing, RTI breakdown, Student Growth Percentile scatter plots, etc.
- When/how often: indicate the intervals the different assessments occur.

Subgroup Assessment Table: Complete using the directions for the Assessment System Table (see below).

1. Indicate any progress monitoring that occurs for the subgroups.
2. A plan should be in place for all subgroups, whether or not the Charter Holder currently has students enrolled that fall into each subgroup.

Subgroup	How will the system assess each subgroup to determine effectiveness of supplemental and/or differentiated instruction and curriculum?
Students with proficiency in the bottom 25%/non-proficient students	
ELL students	
Students eligible for FRL	
Students with disabilities	

(sample provided for reference)

Area IV: Monitoring Instruction

This Area is divided into four sections, each with a set of Guiding Questions. An acceptable plan for this area will provide sufficiently detailed actions steps that includes each of the required elements and presents a comprehensive system for monitoring instruction. Refer to the General Template Directions and Terms to Know when completing this section. Read carefully through the information below, and ensure that each aspect is addressed in the PMP:

	Section	Aspects that MUST be described in detail in the PMP
A	Monitoring Instruction	- gathering evidence to ensure that the classroom instruction is aligned with standards, - identifying if the instruction is taking place in the manner prescribed by curriculum planning documents, - verifying if the instruction allows students to effectively master state standards, and - ensuring that adjustments are made to the curriculum for students in subgroup populations
B	Evaluating Instructional Practices	- gathering evidence to evaluate the effectiveness of instructional practices for all instructional staff, - using criteria to clearly measure instructional quality, and - disaggregating teacher evaluation data to identify strengths, weaknesses, and needs of individual teachers.
C	Adapted to Meet the Needs of Subgroups	evaluating the instruction delivered to each separate subgroup to ensure that necessary adjustments are made regularly for each group.
D	Providing Feedback that Develops the Quality of Teaching	analyzing the information gathered in the teacher evaluation process in order to provide feedback specific to each individual instructional staff member.

Subgroup Monitoring Instruction Table:

1. Indicate what the process will be to monitor the instruction of each subgroup, including both general classroom monitoring and the monitoring of supplemental instruction.
2. A plan should be in place for all subgroups, regardless if the Charter Holder currently has students enrolled that fall into each subgroup.
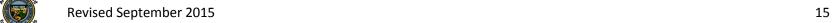
Subgroup	What is the Charter Holder's ongoing process to evaluate supplemental instruction targeted to address the needs of students in the following subgroups?
Students with proficiency in the bottom 25%/non-proficient students	
ELL students	
Students eligible for FRL	
Students with disabilities	

(sample provided for reference)

Area V: Professional Development

This Area is divided into four sections, each with a set of guiding questions. An acceptable plan for this area will provide sufficiently detailed actions steps that includes each of the required elements and presents a comprehensive professional development system. Refer to the General Template Directions and Terms to Know when completing this section. Read carefully through the information below, and ensure that each aspect is addressed in the PMP:

	Section	Aspects that MUST be described in detail in the PMP
A	Developing the Professional Development Plan	• determining what PD topics will be covered throughout the year and • deciding what data and analysis will be utilized to make those decisions.
B	Adapted to Meet the Needs of Subgroups	• determining what topics are addressed during PD to meet the needs of subgroups.
C	Supporting High Quality Implementation	• supporting high quality implementation of PD strategies by providing support and • allocating resources such as time, space and the necessary material items required for implementation.
D	Monitoring Implementation and Follow-up	• monitoring that the strategies learned in professional development are implemented, and • following up with instructional staff regarding levels of implementation.

Area VI: Graduation Rate

This Area is divided into two sections, each with a set of guiding questions. An acceptable plan for this area will provide sufficiently detailed actions steps that includes each of the required elements and presents a system for ensuring students in grades 9-12 graduation on time. Refer to the General Template Directions and Terms to Know when completing this section. Read carefully through the information below, and ensure that each aspect is addressed in the PMP:

	Section	Aspects that MUST be described in detail in the PMP
A	Monitoring Progress towards Timely Graduation	- overseeing the progress of high school students towards timely graduation, - creating academic and career plans, and - identifying signs of academic deficiencies at an early stage.
B	Addressing Barriers to Timely Graduation	- remediating academic and social problems that threaten timely graduation, and - regularly assessing the effectiveness of those strategies.

Area VII: Academic Persistence

This Area is divided into one section with a set of guiding questions. Refer to the General Template Directions and Terms to Know when completing this section. An acceptable plan for this area will provide sufficiently detailed actions steps that includes each of the required elements and presents a system for keeping students motivated and engaged in school. Read carefully through the information below, and ensure that each aspect is addressed in the PMP:

	Section	Aspects that MUST be described in detail in the PMP
A	Strategies for Continuous Enrollment	- identifying, remediating, and monitoring the progress of academically-disengaged high school students, and - regularly assessing the effectiveness of those strategies.

Submitting the PMP

1. Log in to the Charter Holder's ASBCS online account using the Charter Representative's user name (email address) and password.
   http://online.asbcs.az.gov/
2. If the password cannot be located, click the "Forgot Password" icon on the login page to reset the password. An email will be sent to the Charter Representative's email on file from the ASBCS System Administrator (charterschoolboard@asbcs.az.gov) with instructions for resetting .On the Dashboard, place the cursor over the words "Charter Holder". A drop down menu will appear. Select "Uploads" from the drop down menu.
3. The Upload Documents section will contain a link named "Academic Required Information". Click on this link.
4. Upload the PMP Template by selecting "Add a New Document". The Browse box will open and allow the location of the PMP Template on the computer desktop.
5. Once a file has been chosen, select the "Upload" button to complete the upload process.
6. Repeat steps 1 – 5 to upload a Financial Performance Response (if required). For more information see the Financial Performance Response section below.
7. Upload only the required documents. The Charter Holder must upload only the PMP Template and a Financial Performance Response (if required). Additional documents will not be reviewed.

Financial Performance Response

Financial Performance

A dashboard representation of the Charter Holder's financial performance, based upon the indicators and measures adopted by the Board, is available through ASBCS Online. Instructions for accessing the financial dashboard are as follows:

- Go to http://online.asbcs.az.gov. Do not log in.
- Under the "Search" option, select "Charter Holders".
- Enter all or part of the charter holder name and click "Search".
- Select the applicable charter holder from the search results.
- Select the "Performance" tab.

A Charter Holder that does not meet the Board's financial performance expectations will be required to submit a financial performance response.

For more information on preparing the financial performance response and the criteria Board staff will use to evaluate the response, see Appendix C of the Board's *Financial Performance Framework and Guidance* and the additional resources available under "Financial Performance

Response" on the [Board's website](). **NOTE:** *All responses will be available for public review. If references will be made to or include any sensitive information (e.g., bank account numbers), redact that information prior to submitting the response to the Board.*

PMP Process: Review, Evaluation and Feedback

The table below outlines the steps that occur after a PMP is submitted.

Step	PMP Process	Action
1	Administrative Completeness Check	Upon PMP submission, staff conducts an Administrative Completeness Check to determine if: • all Charter Holder information is present and correct • all action steps have been provided • all action steps have all required components • all required areas have been addressed in the PMP A letter will be sent notifying the Charter Holder whether or not any deficiencies exist, and the deadline for correction.
2	Charter Holder Revisions in response to Administratively Completeness Check	If the PMP is administratively incomplete, the Charter Holder must resubmit the PMP with revisions within 2 weeks of the Administratively Completeness Check.
3	Staff Evaluates the PMP	Once an Administratively Complete PMP has been received, Board staff will evaluate the PMP for a comprehensive plan in each of the Areas. See below for further guidance on how to understand the PMP Evaluation.
4	Staff completes the Technical Guidance document	Board staff will complete the Technical Guidance document. This document lists all the questions Board staff had when reviewing the PMP in relation to the guiding questions.
5	PMP Evaluation and Technical Guidance notification	Staff sends the PMP Evaluation and Technical Guidance to the Charter Holder. If revisions to the PMP are required, the Charter Holder will be notified.
6	PMP Revision	If a PMP revision is an option or requirement, see the PMP Template Completion Directions (*Revised PMP Instructions*) for more information on what is required as part of this process. Steps 1-5 will follow.

Guide to Understanding the PMP Evaluation/Technical Guidance

Following the receipt of the PMP Evaluation, the Charter Holder may be required to revise the PMP if the overall evaluation found the PMP to be unacceptable (rated overall as "Does Not Meet" or "Falls Far Below"). A PMP that is evaluated as unacceptable indicates that the submitted plan suffers from deficiencies that may hinder the implementation of comprehensive systems and collection of sufficient evidence to document the implementation of comprehensive systems. The Charter Holder should review the evaluation and additional technical guidance feedback in their entirety and utilize these to guide revision and implementation of the submitted plan. Changes to the PMP should take into consideration the requirements of a Demonstration of Sufficient Progress as one may be required at a later date based on the Charter Holder's academic performance in subsequent years.

Some Charter Holders will be required to submit the revisions to their PMP. For more information on this Process, see "*Revised PMP Instructions*".

Technical Guidance Document:

This document provides assistance to the Charter Holder specific to the Action Step Processes/Frequency/Person(s) Responsible/Evidence on the PMP. Each area contains questions that represent gaps in the PMP, and require additional information for the plan to be evaluated as sufficiently detailed. If a PMP revision was not required, these questions should be considered in the event the Charter Holder is required to submit a Demonstration of Sufficient Progress report in a subsequent year.

The Charter Holder should review the evaluation and additional technical guidance feedback in their entirety and utilize these to guide revision and implementation of the submitted plan.

PMP Evaluation:

    I.   Board staff evaluated the PMP based on the completeness of all the components of each action step, and whether the PMP addressed each aspect of the guiding questions.

        a.   An action step that includes a complete response will be evaluated as "Meets".

        b.   An action step that answered some of the components, but not all, will be evaluated as "Does Not Meet".

        c.   If the Charter Holder failed to provide a complete response for each of the components, then the answer will be evaluated as "Falls Far Below".

II. For any area that was evaluated as "Does Not Meet" or "Falls Far Below", feedback will be provided as Technical Guidance.

III. An example of the PMP Evaluation is provided on the next page to demonstrate how to interpret a PMP Evaluation.

Area II: Curriculum

A. Evaluating Curriculum

1.   What is the Charter Holder's process for evaluating curriculum?

Relevant Action Steps # 1	
Action Steps	**Documentation**
☐ Complete ☐ Failed to Address ☒ Partial based on action steps #1	☐ Complete and detailed evidence of implementation ☒ Limited evidence of implementation for action steps #1 ☐ Failed to identify relevant documents
Areas of concern: ☒ Essential Details ☒ Interval ☐ Responsible Party	

2.   How does the Charter Holder evaluate how effectively the curriculum enables students to meet the standards?

Relevant Action Steps - none	
Action Steps	**Documentation**
☐ Complete ☒ Failed to Address ☐ Partial based on action steps #	☐ Complete and detailed evidence of implementation ☐ Limited evidence of implementation for action steps # ☒ Failed to identify relevant documents
Areas of concern: ☐ Essential Details ☐ Interval ☐ Responsible Party	

3.   How will the Charter Holder identify gaps in the curriculum?

Relevant Action Steps #1, 2	
Action Steps	**Documentation**
☒ Complete ☐ Failed to Address ☐ Partial based on action steps #	☐ Complete and detailed evidence of implementation ☒ Limited evidence of implementation for action steps #1 ☐ Failed to identify relevant documents
Areas of concern: ☐ Essential Details ☐ Interval ☐ Responsible Party	

Section Rating - A. Evaluating Curriculum

Action Steps:
☐ The action steps provided describe a complete process for evaluating curriculum.
☒ The action steps provided describe a partial process for evaluating curriculum.
☐ The action steps provided failed to describe a process for evaluating curriculum.

Evidence:
☐ The documents, as described, would provide detailed evidence of the process for evaluating curriculum.
☒ The documents, as described, would provide limited evidence of the process for evaluating curriculum.
☐ The documents, as described, did not provide relevant evidence of the process for evaluating curriculum.

Callout (left): This action step clearly listed WHO was responsible for evaluating curriculum, but failed to address the intervals and detailed process for evaluating. Therefore, the PMP evaluation for this action step is "partial".

Callout (left): In this case, relevant information was found in action steps 1 and 2 to address how gaps are identified. The action steps were complete and addresses all components.

Callout (right): Because the process for implementing was lacking sufficient detail, the evidence is also insufficient. Therefore, "limited" has been checked.

Callout (right): In this case, none of the action steps addressed how effective the curriculum will be in enabling the students to meet the standards. Therefore, "failed" has been checked.

Callout (right): Although the action steps were complete, the evidence listed did not cover the all the aspects outlined in the answer. Therefore, "limited" has been checked.

Callout (bottom): The evaluation for this section will only be "complete" if all action steps in each section are evaluated as complete. If all action steps are "Failed", then the evaluation for this section will be "failed". Any other combination of evaluations will be marked as "partial".

Attachment A: PMP Checklist

☐ Review PMP Guide for Charter Holders, PMP Evaluation Criteria, and Charter Holder Academic dashboard.

☐ Determine if Graduation Rate and Academic Persistence must be addressed in the plan.

☐ Complete action steps for each area (Curriculum, Assessment, Monitoring Instruction and Professional Development)

☐ Complete action steps for Graduation Rate and Academic Persistence (if applicable).

☐ Complete Area I: Data.

☐ Complete the Charter Holder Information.

☐ Save file as directed.

☐ Submit PMP by the deadline date described in the notification letter.

Attachment B: Terms to Know

Academic persistence—the percentage of students that remained enrolled in any public school from the previous year

Area—one of the essential elements that comprise a comprehensive system for improving a school's academic performance (i.e. Data, Curriculum, Assessment, Monitoring Instruction, and Professional Development, Graduation Rate, and Academic Persistence)

Areas of high importance—the identified professional development needs, generally of the majority of staff, that have been identified through student assessment, data analysis, or a needs assessment, and must be addressed to meet the needs of the majority of the student body

Assessment—the systematic methods and tools used to evaluate, measure, and document student learning progress and skill acquisition

Benchmarking data—assessment results collected at specific intervals throughout the year to inform the Charter Holder about student performance in relation to the identified indicators

Concrete resources—financial support or tangible items provided to staff to aid in implementation of curriculum or professional development strategies

Curricular gaps—standards or skills that are not addressed or lack sufficient breadth and depth to develop student mastery through full implementation of the curriculum

Curricular tools—tools that indicate what must be taught and when it must be taught (e.g. curriculum maps, pacing guides)

Curriculum—the content, programs, and materials that teachers will utilize with students to allow achievement of educational outcomes and mastery of the standards

Disengagement—when students have feelings of alienation, a poor sense of belonging, and a general dislike for school; often measured by absenteeism and discipline problems

Engagement—positive student behaviors such as attendance, paying attention, and participating in class; identifying with school and feeling one is cared for, respected, and part of the school environment

Fidelity—using the instructional strategies and delivering the content of the curriculum in the way that they were designed to be used and delivered

Frequency—how often something occurs (e.g. weekly)

Growth—student progress over time; how much students learn and improve over a school year

Implementable action steps—specific actions, tasks, or meetings, placed in a logical and sequential order, that contribute to a comprehensive system

Indicator—general category of academic performance (i.e. growth, proficiency, and post-secondary readiness)

Instruction—the manner in which teachers present curriculum to students

Instructional methodology—the manner in which instruction is delivered

Internal data—results acquired from student assessments administered by the Charter Holder

Measure—general means to evaluate an aspect of an indicator (e.g. proficiency on state assessments)

Metric— method of quantifying a measure

Performance measures—the specific skills or knowledge measured by assessment (e.g. oral reading fluency, Lexile level, or math fluency)

Post-Secondary readiness (for high schools)—how well a school's students are prepared for college or employment after graduation

Professional development—a comprehensive, sustained, and intensive approach to improving teachers' skills, knowledge, and expertise as a teacher

Professional development plan—the plan by which teachers will be developed at specific times throughout the year and through different formats (e.g. workshop, mentoring, action research)

Proficiency—student achievement; the percentage of students meeting standards

Reliable—consistent and stable; provides the same results each time it is used within the school

Section—the required components that comprise a particular area

Staff learning needs—the specific professional development needs of individual staff members, or small groups of staff members, that include both strengths and weaknesses as identified through observations, evaluations, or other prescribed methods utilized by the Charter Holder

Standards—the knowledge and skills students are expected to acquire by the end of a grade

Subgroup—a group of students who share similar characteristics; four subgroups have been identified and are included in the Board's Academic Performance Framework : students with proficiency in the bottom 25% (non-proficient students for Alternative Schools), English Language Learners (ELL), students qualifying for Free and Reduced Lunch (FRL), and students with disabilities (SPED)

Sufficiently detailed—a plan that contains such clear steps and procedures that if the entire leadership team left the school, new leaders could comprehend and fully implement the plan without need for explanation

Supplemental curriculum—additional curriculum (e.g. an intervention program, computer-based program, or other specific components) used to reinforce, enrich, or extend the basic program of instruction

Support—assistance or intangible resources provided to staff to aid in implementation of curriculum or professional development strategies

Target—threshold that signifies success in *meeting the standard* for a specific measure

Timing—a specific time (e.g. December) or in conjunction with a specific event (e.g. 1 week after benchmarking)

Valid—measures the intended metric within the school